

## USER MANUAL



# MappyField 365

## “Installation & General Configuration”

**Version: 5.0.0**

**Compatibility:**

Dynamics CRM 2016 or Dynamics 365, Online or On-premises  
or PowerApps

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## Introduction

**AppJetty MappyField 365** plugin provides geo-analytical solutions to **Dynamics CRM** users and helps them to plot CRM data in maps.

In this user manual, we have explained **installation, activation, & configuration** of the MappyField 365 plugin in the DynamicsCRM.

**MappyField 365 Map view** and its **Functionality** user manual is sperate. In that manual we have explained the features and functionality of the MappyField 365.

## Prerequisites

Following requirement must be followed before starting the Plugin installation:

- You should be logged into Dynamics CRM 2016 or Dynamics 365, Online or On-premises.
- You will have to generate **Bing Map API** key. [How to generate Bing Map API Key?](#)

## Installation & Activation

### New changes

As per the **MappyField 365** version **5.0.0**, the following topics are updated or newly added:

- New UI-UX
- Dashboard Configuration
- Live User Tracking
- Analytical Dashboard Individually

## Installation Steps

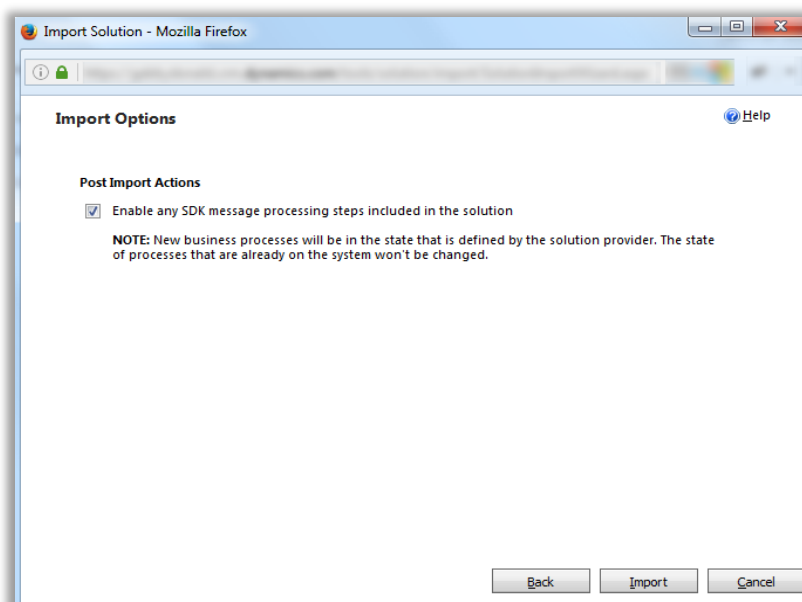
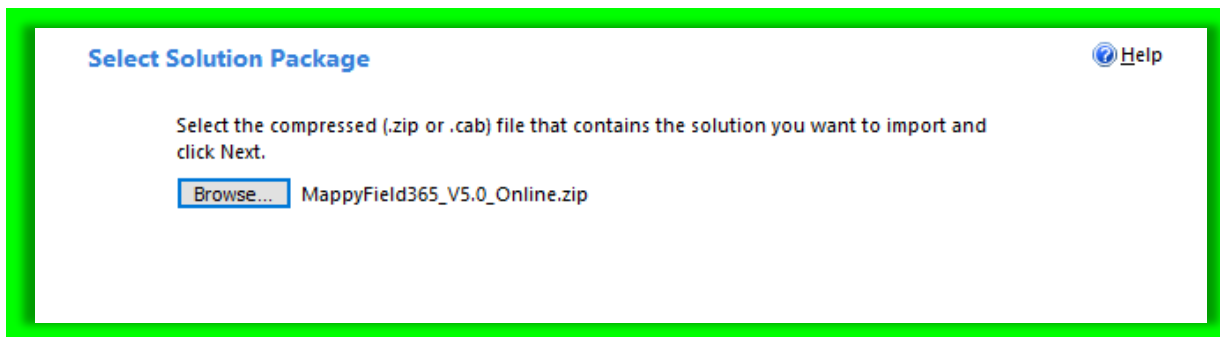
➤ To install '**MappyField 365**' plugin, the following steps are to be followed:

- On purchasing the plugin, you will get a zip file named "**MappyField 365 365.zip**".
- Login into your CRM Account and click on **Settings -> Solutions**.

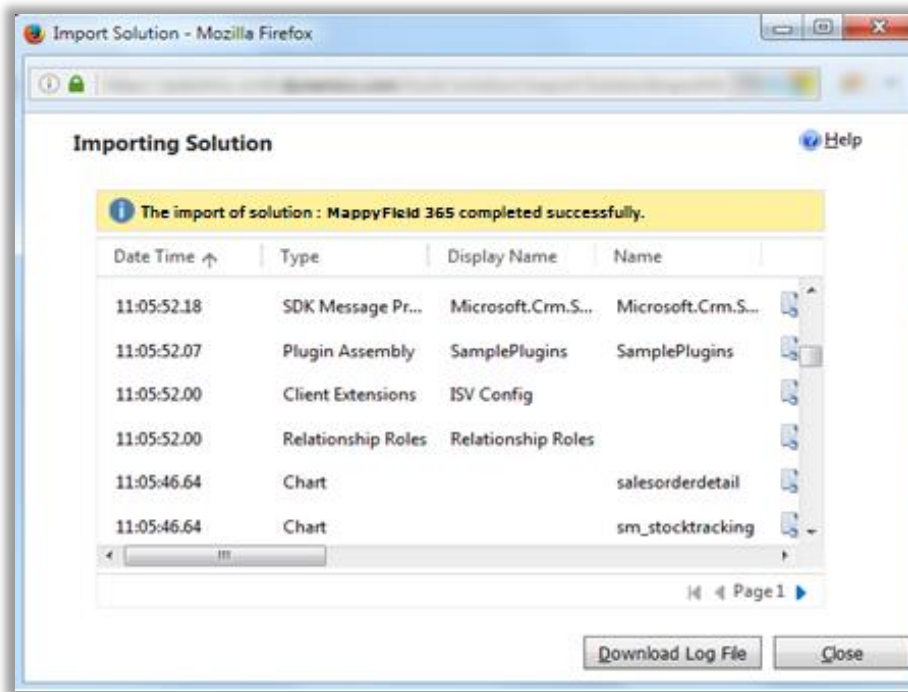


- Click on '**Import**' to upload and install the Solution.
- Click on '**Choose File**' button and choose the Package Zip File for **MappyField 365** from the Import Solution Window. Click on '**Next**' for further processing.

**Note:** You will get the MappyField 365 package zip in the main folder of the MappyField 365 and find the package in that folder. MappyField 365 → MappyField 365\_V5.0.Zip.



- Check the box to enable any SDK message processing steps included in the solution and click on Import button to Import the Solution.



- Click on '**Close**' after successful completion message is displayed.
- Once you import the solution, it will be displayed in the solutions grid view.



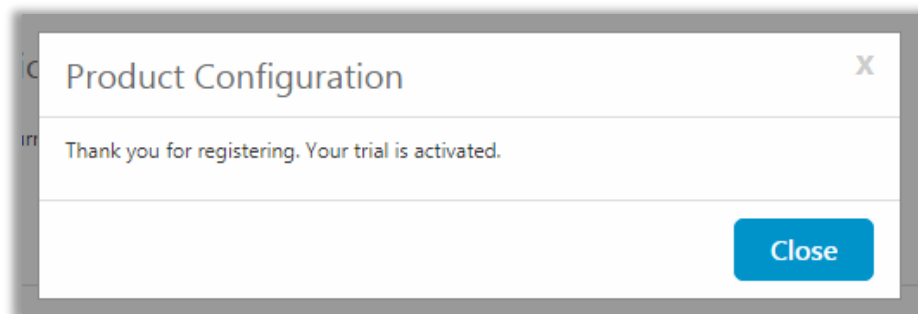
## Activate Your Free Trial

- Double click on '**MappyField 365**' solution to configure the plugin with your license key.
- This will open up a new window. Click on '**Configuration**' from the options provided on the left side.



The screenshot shows the Appjetty application interface. On the left is a sidebar menu with categories like Information, Configuration, Components, and various templates. The main area is titled 'Activate Your Free Trial' and contains a 'Profile' section with input fields for 'First Name\*' (filled with 'Renley'), 'Last Name\*' (filled with 'Snow'), and 'Email\*' (filled with 'renleysnow251@gmail.com'). There is a blue 'Activate' button at the bottom right. At the top right, there are two status boxes: 'Expire On:' and 'Status: Unregistered'.

- You can activate your one-month free trial.
- To get a one-month free trial license key, fill out the details and click on '**Activate**' button.



- Your trial will get activated and expiry date will be displayed on top.

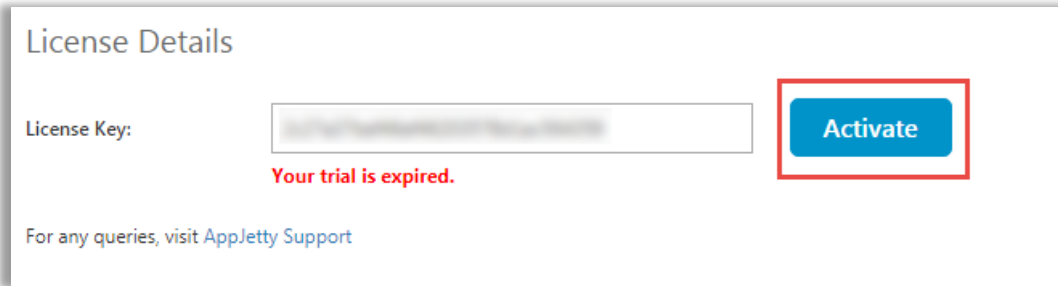
The screenshot shows the AppJetty interface. At the top left is the AppJetty logo. At the top right, there are two boxes: 'Expires On: 5/6/2018' and 'Status: Trial'. Below the logo, there are two tabs: 'Profile' and 'Setup', with 'Setup' being the active tab. The main heading is 'Purchase License'. Below it, a message states: 'Your free trial is currently active. You can purchase the plugin anytime by clicking on the below button.' A blue 'Buy Now' button is centered. Below this is a section titled 'License Details'. It contains a 'License Key:' label followed by a blurred text box. Below the text box, a green message says: 'Your free trial will expire in 30 day(s)'. A note below that states: 'Note: This is not real time information and will be updated in the next 24 hours.' At the bottom, it says: 'For any queries, visit AppJetty Support' with a link to 'AppJetty Support'.

- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.

The screenshot shows the AppJetty interface after the trial has expired. At the top right, the 'Expires On' box now shows '12/5/2017' and the 'Status' box shows 'Trial-Expired'. The 'Setup' tab remains active. The 'Purchase License' section now has a message: 'Your free trial is expired. You can purchase the plugin anytime by clicking on the below button.' The blue 'Buy Now' button is still present. In the 'License Details' section, the 'License Key:' label is followed by a blurred text box, and a red message below it says: 'Your trial is expired.' The note and support link at the bottom remain the same.

## Activation

- On expiration of Trial, a message will appear that the Trial is expired.



License Details

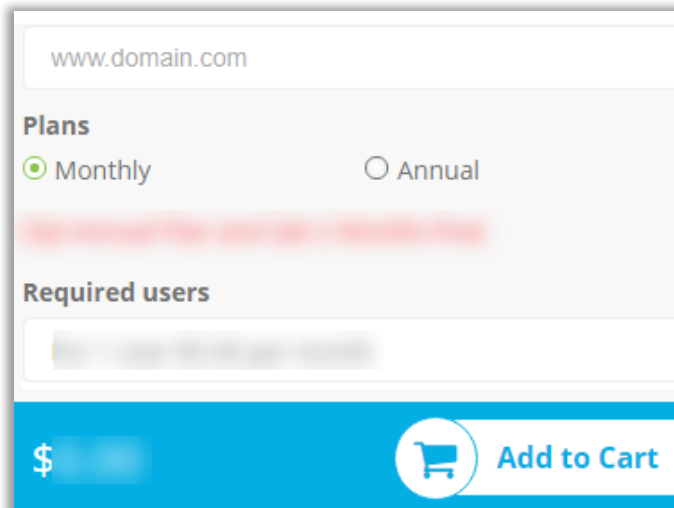
License Key:

**Your trial is expired.**

[For any queries, visit AppJetty Support](#)

**Activate**

- Now to purchase the license click on **'Buy Now'** button.
- This will redirect you to our product page and a pop-up will appear. Click on **'Add to Cart'** button and complete the purchase process.



www.domain.com

**Plans**

☒ Monthly ☐ Annual

**Required users**

\$  **Add to Cart**

- On successfully completion of the purchase process, you will receive your license key via email along with steps to complete the license configuration.



## Insert License Key

- Enter the New License key received in mail. This will enable the '**Activate**' button.
- Click on '**Activate**' button to activate your license.

The screenshot shows the 'Setup' tab of the AppJetty configuration window. Under 'License Details', there is a text input field for the 'License Key'. Below it, a green message states: 'The plugin has been activated and your next payment cycle will be initiated on 7/14/2018'. A link to 'AppJetty Support' is provided for queries. The 'Manage Users' section shows 'Total allowed license user: 1' and 'Remaining license user: 4'. It features two list boxes with arrows between them. The left list box contains 'Delegated Admin', 'INTEGRATION', 'Support User', 'SYSTEM', and 'Mark Smith'. The right list box contains 'Yenki Tech'. A blue 'Save' button is at the bottom left.

- Default settings under set up tab can be managed only if a user has **System Administrator Role**, **AppJetty MappyField 365 Admin**. Or else it would show error message stating "You don't have administrative rights. Please contact administrator."

## Setup for Admin

### Default Configurations (Setup)

- To manage the default configuration settings for Admin user, click on 'Setup' tab and enter default configurations.
- Admin user can set the default view of the map by configuring from here.

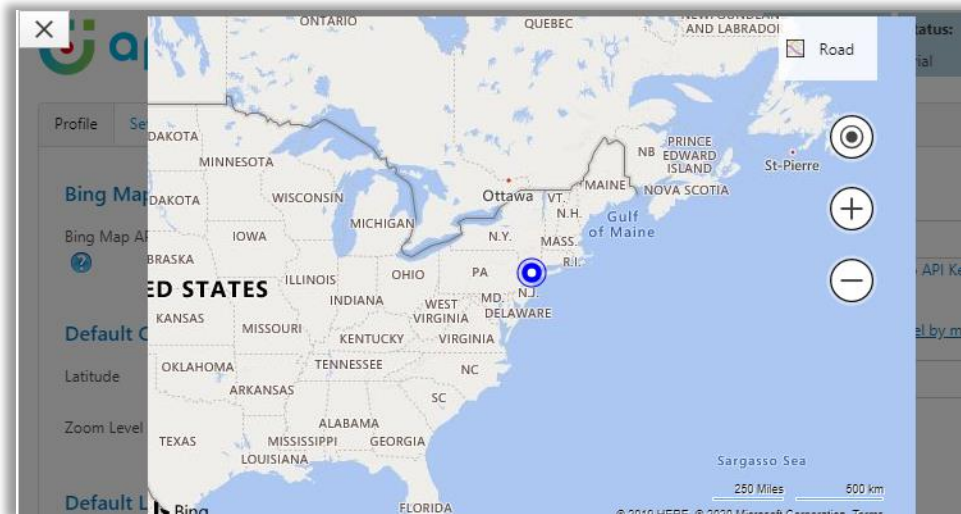


- Bing Map API Key:** Enter Bing map API key which you have generated from.

**Note:** To assist you further, we have added a link beneath the text box that states **How to generate Bing Map API Key**.

- Under "Default Configuration" option, set default **Latitude**, **Longitude** and **Zoom** level for map when it is opened for the first time.

- You can set the default location using the map as well by clicking on “**Set latitude, longitude and zoom level on map**” option available on the right-hand corner.
- By clicking on it, the map will open in new window. You can set the location by moving the icon as shown in below screenshot.



### Default Limits

Distance Unit
Miles

Direction
Shortest time

### Heat Map Settings

High
Medium
Low

### General

Enable Live Traffic
☐

Optimize Route
☒

Enable User Tracking
☒

Save
Cancel
Configure Languages

- Set “Default Limits” for distance unit and direction. Distance unit can be in Kilometers or Miles and Direction can be Shortest Time or Shortest Distance.
- You can also set colors for ‘Heat Map’ configuration which would indicate the intensity of the data. *i.e. High, Medium and Low.*
- A user can also enable/disable **Live traffic** on Bing Maps and **Optimize** the route using SPF (Shortest Path First) feature from the configuration.
- A user can enable/disable **Live User tracking** feature from configuration to track users.

## Configure Languages

- You can also configure language of your choice by clicking on **Configure Languages** button available on Setup page.



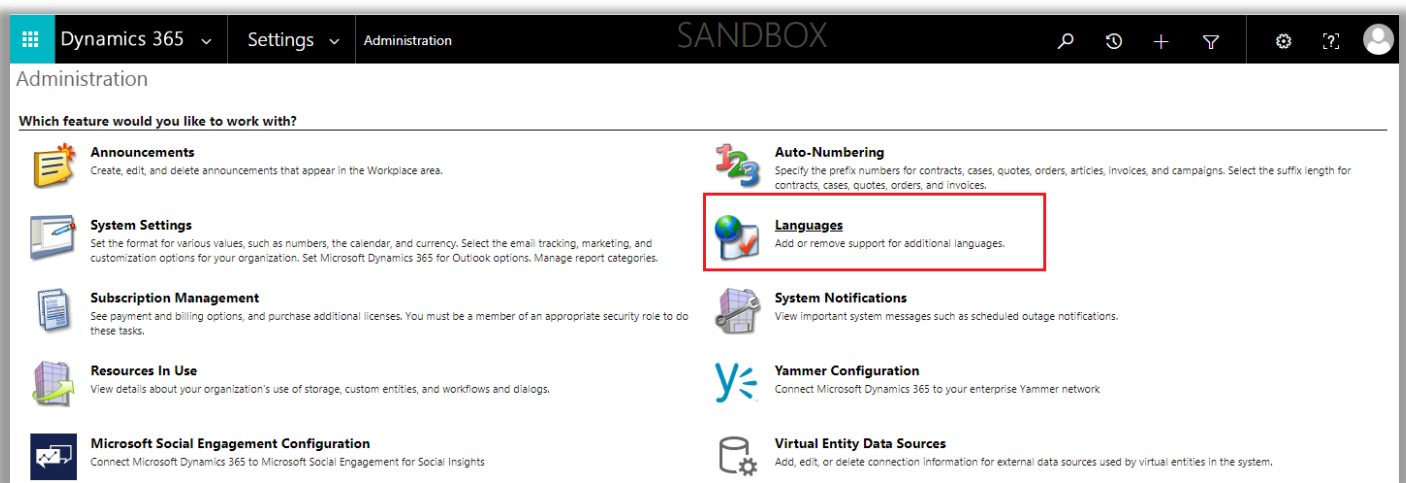
The image shows a 'Language Configuration' dialog box. At the top, there is a dropdown menu currently set to 'English - United States', which is highlighted with a red rectangle. Below this, there is a table with two columns: the first column contains English terms and the second column contains their Spanish translations.

English	Spanish
Map	Mapa
Directions	Direcciones
Definitions	Definiciones
Locations	Ubicaciones
Configuration	Configuración
Search	Buscar
Clear	Claro

- Select the language from dropdown that you wish to configure your messages.
- Here, you need to add translations for the messages in the language of your choice.
- Click on **Save** button to save the language translations.

**Note:** To configure languages, user first needs to manage language settings from CRM. Languages that are selected in CRM can be listed for the MappyField 365.

- Go to **Settings** → **Administration** → **Languages** to enable/disable the languages.



The image shows the Dynamics 365 Administration page. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Administration'. The main heading is 'Administration'. Below this, there is a section titled 'Which feature would you like to work with?' with a grid of feature tiles. The 'Languages' tile is highlighted with a red rectangle. It features a globe icon and the text 'Add or remove support for additional languages.'

**Announcements**  
Create, edit, and delete announcements that appear in the Workplace area.

**System Settings**  
Set the format for various values, such as numbers, the calendar, and currency. Select the email tracking, marketing, and customization options for your organization. Set Microsoft Dynamics 365 for Outlook options. Manage report categories.

**Subscription Management**  
See payment and billing options, and purchase additional licenses. You must be a member of an appropriate security role to do these tasks.

**Resources In Use**  
View details about your organization's use of storage, custom entities, and workflows and dialogs.

**Microsoft Social Engagement Configuration**  
Connect Microsoft Dynamics 365 to Microsoft Social Engagement for Social Insights

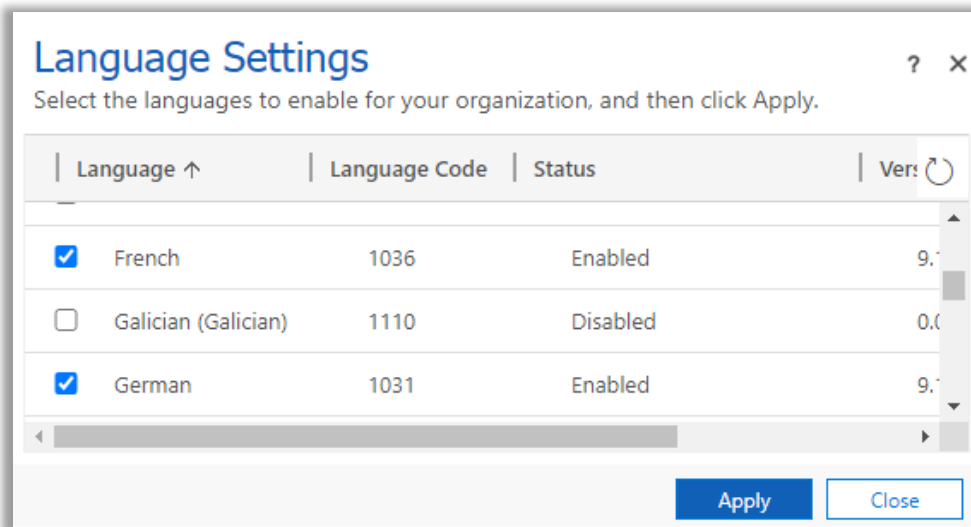
**Auto-Numbering**  
Specify the prefix numbers for contracts, cases, quotes, orders, articles, invoices, and campaigns. Select the suffix length for contracts, cases, quotes, orders, and invoices.

**Languages**  
Add or remove support for additional languages.

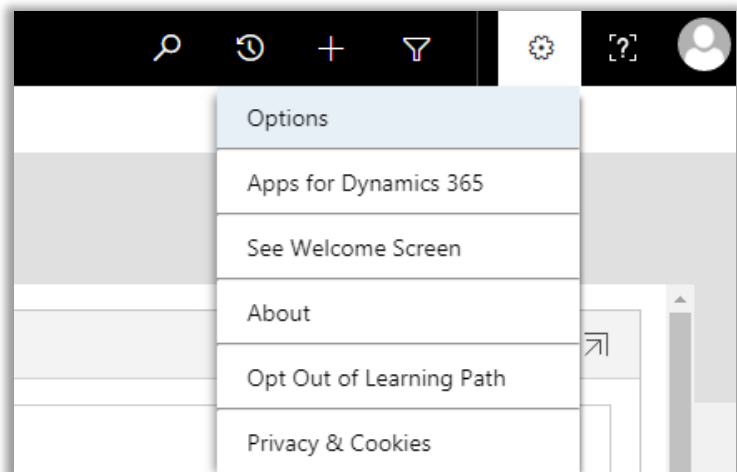
**System Notifications**  
View important system messages such as scheduled outage notifications.

**Yammer Configuration**  
Connect Microsoft Dynamics 365 to your enterprise Yammer network.

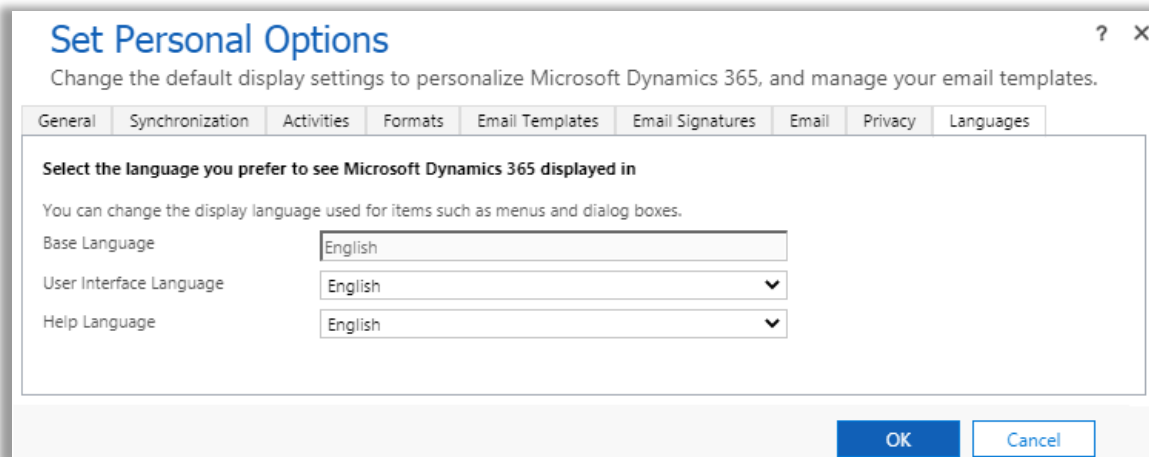
**Virtual Entity Data Sources**  
Add, edit, or delete connection information for external data sources used by virtual entities in the system.



- You can enable or disable multiple languages from the list. After settings the language, click on the **Apply** button. This allows you to change languages in Microsoft Dynamics 365.
- Click on the **Settings gear** icon at the top right of the screen, choose Options to open the Set Personal Options window.



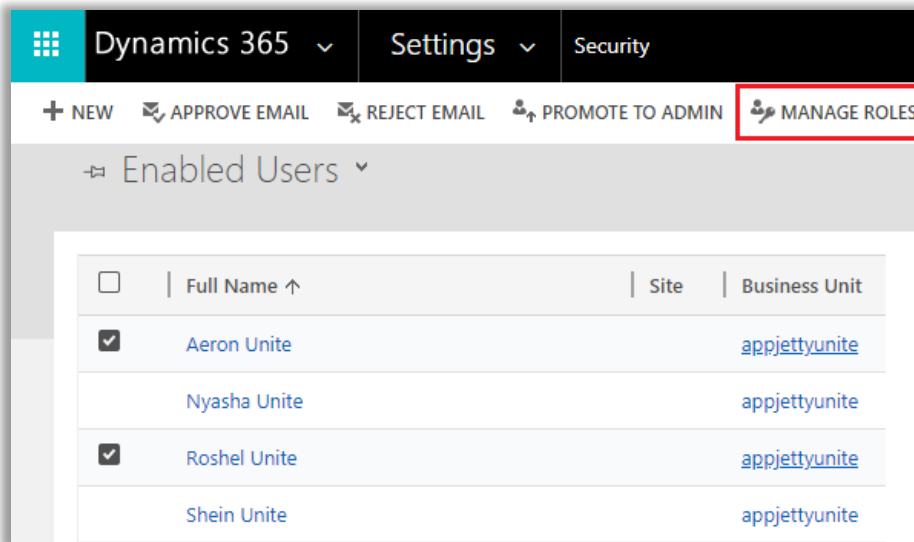
- Go to the **Languages** tab, select your user interface language, then click **OK**.



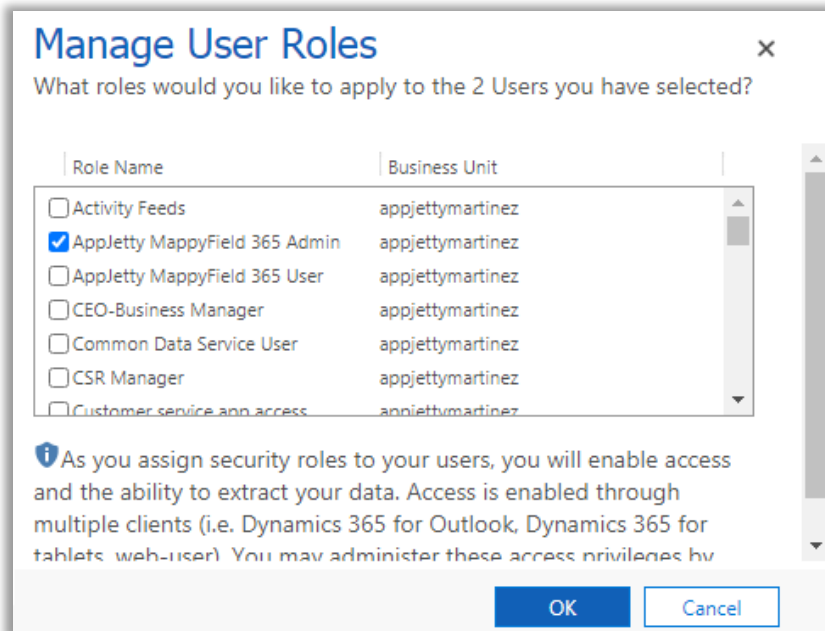
- Once you select the language here, that language will enable in the 'Configure Language' of MappyField 365 Setup.

## Assign User Role

- To manage the user roles, navigate to **Settings -> Security -> Users**.



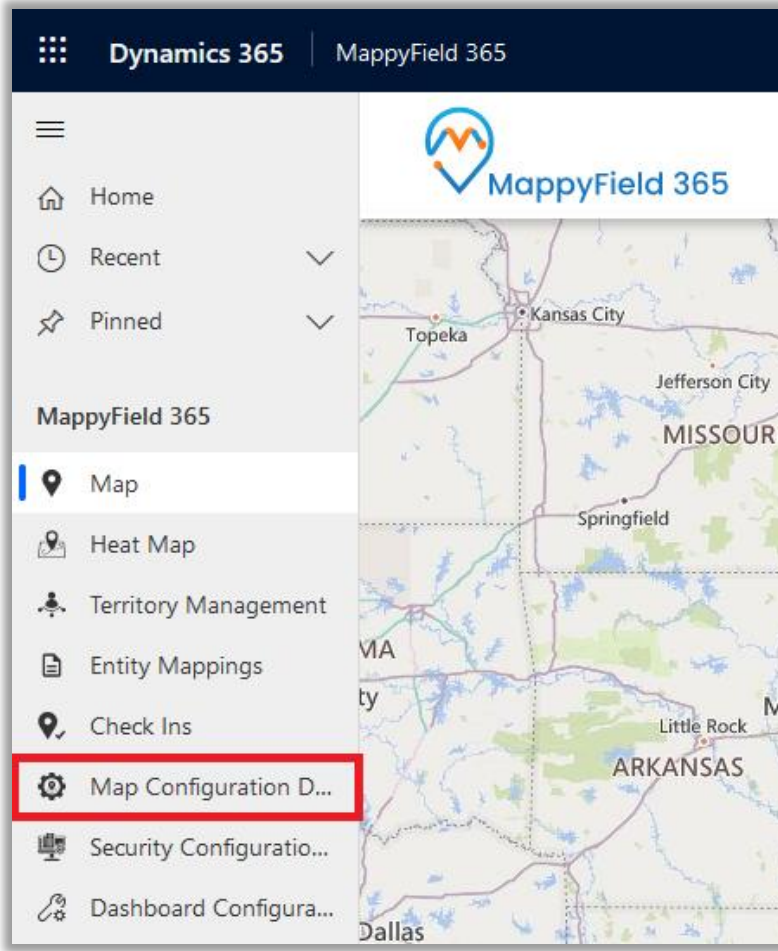
- Now select the users whose roles are to be managed and click on **'MANAGE ROLES.'**
- This will open a pop up to select roles.



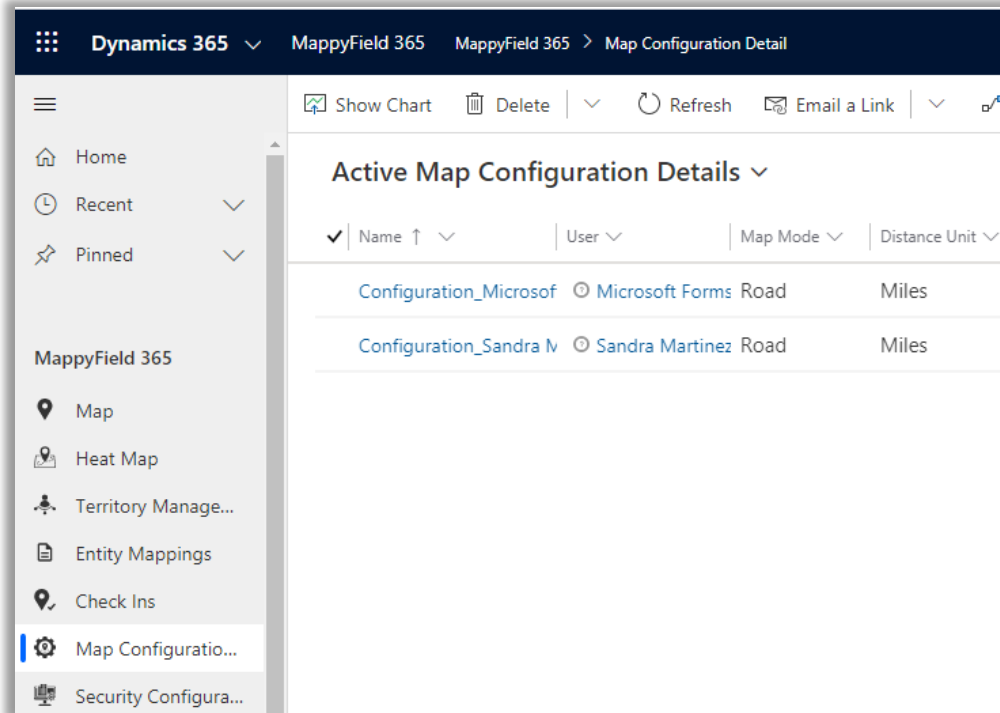
- The available roles for selection are **AppJetty MappyField 365 Admin** or **AppJetty MappyField 365 User** role.
- User with AppJetty MappyField 365 **Admin** role can perform all the actions like **System administrator** while user with AppJetty MappyField 365 User role can do all actions except **delete** actions.

## User Wise Map Configuration

- On assignment of any role like AppJetty MappyField 365 Admin, AppJetty MappyField 365 User or System Administrator role, configuration settings record must be created. This can be accessed by navigating to **Map Configuration**.



- On navigating to **MappyField 365 Configuration**, it would show list of all the users with MappyField 365 role or System Administrator.



**Note:** These configurations are default user-based configurations that will be set as default when map is loaded.

- Following are the configurations:
  - **Map Mode:** User can select default map mode. It can be road or aerial mode.
  - **Zoom Level:** User can set default zoom level for the map. It can also be managed based on settings made from the contextual menu.
  - **Plot Data:** Default plotting of data can be defined. Either it can be in cluster or non-cluster format.



MAP CONFIGURATION DETAIL : INFORMATION  
Configuration\_Nyasha Unite


General

Name *	Configuration_Nyasha Unite	Owner *	Shein Unite
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Defaults

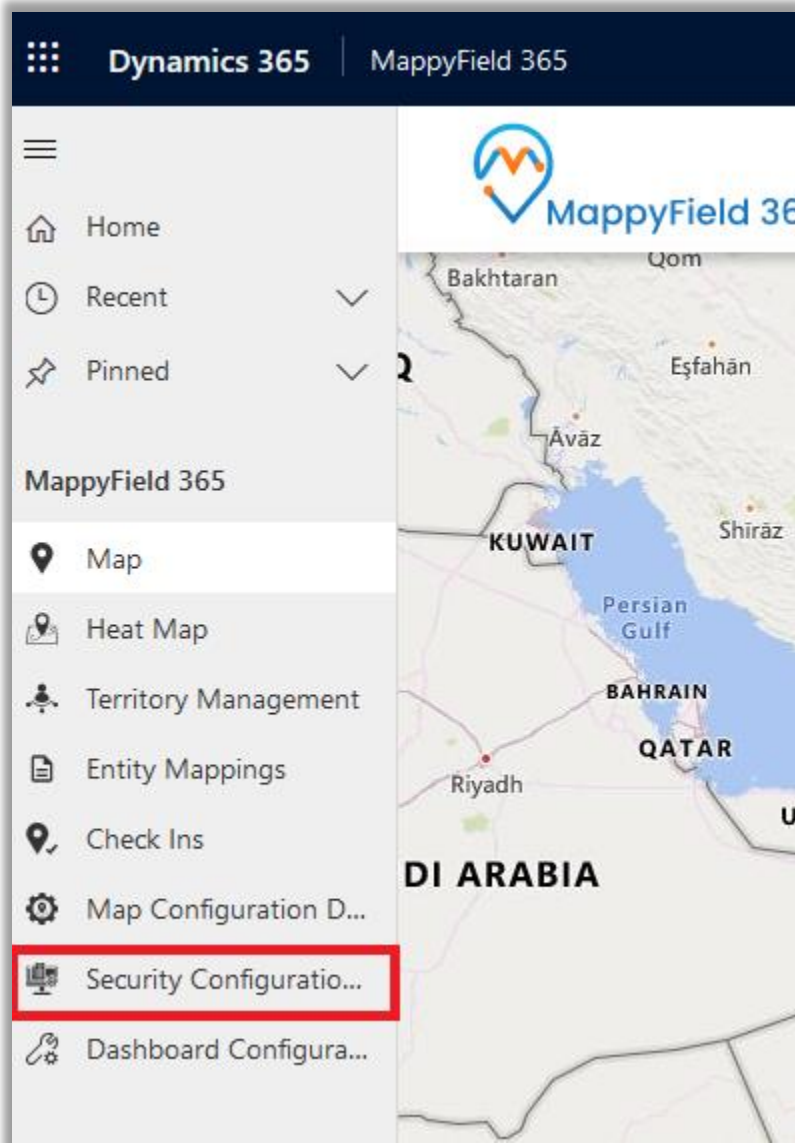
Map Mode *	Road	Along The Route Distance	-----
Zoom Level	5	Along The Route Distance Unit	Miles
Map Center	23,72	User	Nyasha Unite
Plot Data *	Non Cluster	Security Template Configuration	Sales Reps
Distance Unit *	Miles	Navigate Via *	Google
Route Option *	Shortest Time	Check In	No
Default Location	-----		
Default Origin	-----		
Default Destination	-----		

- **Distance Unit:** Default option for distance measuring. Either miles or kilometers.
- **Route Options:** You can define best way to determine route from this feature.
- **Default Location:** The user can define the default location using this option.
- **Default Origin:** The user can define the default origin using this option. It can also be managed based on settings made from the contextual menu.
- **Default Destination:** The user can define the default destination using this option. It can also be managed based on settings made from the contextual menu.
- **Along the route distance:** Define radius of along the route search.
- **Along the route distance unit:** Define default unit for along the route search.
- **Security Template Configuration:** Define the default 'Security Template' for the user if required.  
**Note:** Here the list of the Templates will appear as per the **Security Template Configurations**.
- **Navigate via:** Select navigate to check the routes by using Google Maps, Waze Map or Apple Map.
  - **Check In:** Enable or disable the 'Check In' module. If you enable the **Check In, Check In Radius (KM)**, the option will get enabled.
  - **Check in Radius:** Define Geo Radius that can be allowed to perform any check in.


User	 Shein Unite
Security Template Configuration	-----
Navigate Via *	Google
Check In	Yes
Check In Radius (KM) *	0.20

## Security Template Configuration

- Only **System administrator** or **User** with **AppJetty MappyField 365 Admin** role can create Security Template for other CRM users with AppJetty MappyField 365 User role.
- User admin can assign selected actions to different users using security templates.
- To create a 'security template', navigate to **AppJetty -> Security Template Configuration**.
- Click on **+ New** button from the action ribbon and enter template name and select all the actions that you want to make available for users with that template.




SECURITY CONFIGURATION : INFORMATION


General Template 

▾ Action Configuration



Infobox Actions	
Select All Actions	<input type="checkbox"/>
Add To Origin	<input checked="" type="checkbox"/>
Add To Destination	<input checked="" type="checkbox"/>
Send Email	<input checked="" type="checkbox"/>
Assign Owner	<input type="checkbox"/>
Add To Marketing List	<input checked="" type="checkbox"/>
Proximity Search	<input checked="" type="checkbox"/>
Related Records	<input checked="" type="checkbox"/>
Point Of Interest	<input checked="" type="checkbox"/>
Delete Record	<input type="checkbox"/>
Add Task	<input checked="" type="checkbox"/>
Add Appointment	<input checked="" type="checkbox"/>



Bulk Actions	
Select All Bulk Actions	<input type="checkbox"/>
Add To Route	<input checked="" type="checkbox"/>
Assign Owner	<input type="checkbox"/>
Add Task	<input checked="" type="checkbox"/>
Add Appointment	<input checked="" type="checkbox"/>
Send Email	<input checked="" type="checkbox"/>
Territory Management	<input type="checkbox"/>
Summary Card	<input checked="" type="checkbox"/>
Copy Records	<input type="checkbox"/>
Export To Excel	<input checked="" type="checkbox"/>
Export To PDF	<input checked="" type="checkbox"/>
Print Records	<input checked="" type="checkbox"/>
Add To Marketing List	<input checked="" type="checkbox"/>
Point Of Interest	<input checked="" type="checkbox"/>
Category	<input checked="" type="checkbox"/>

Active 

Click on **Save**  icon. Upon saving, it would enable Configuration Details section from where you can directly assign that template to a user.

Configuration Details

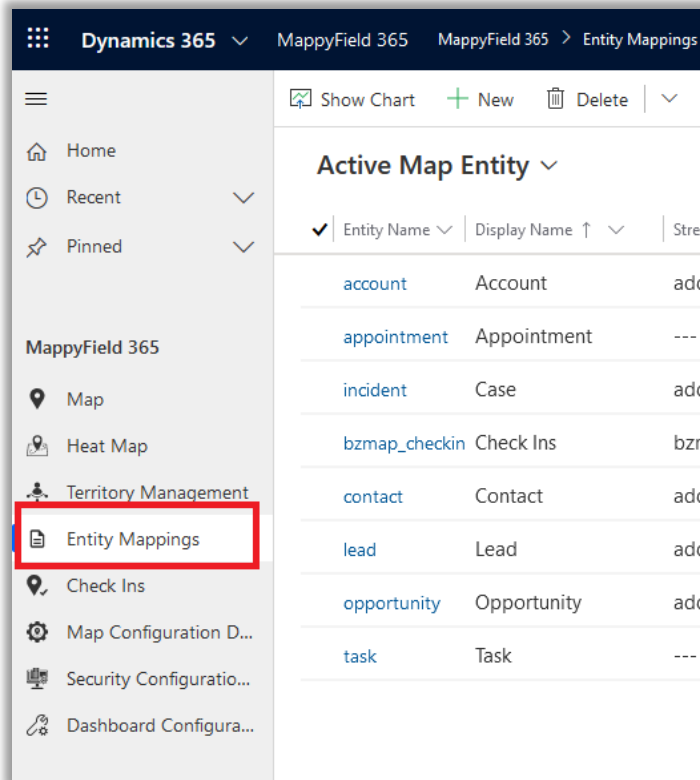
 

Name ↑	User	Map Mode	Distance Unit	Route Option	Heat Map Type	Plot Data	Default Location	Zoom Level
 Configuration_Aeron Unite 1/27/2020 4:43 PM								
 Configuration_Nyasha Unite 1/27/2020 4:43 PM								

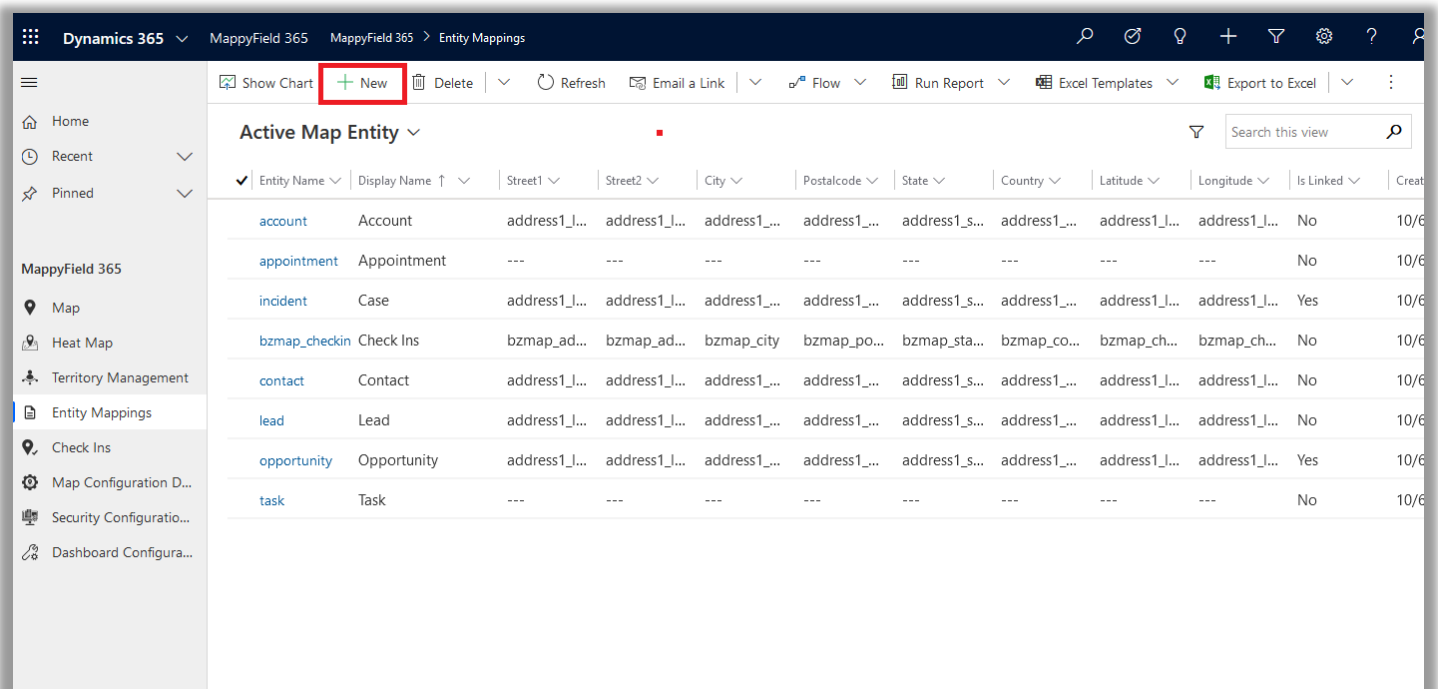
[Look Up More Records](#)

## Entity Mappings

- Navigate to **AppJetty -> Entity Mappings** to display the entity with its relevant details on the MappyField 365. From here you can add a new entity and configure its required details.



- By clicking on Entity Mapping, the list of entities can be seen which are already mapped.



- Click on “**New**” button, this will open a new window for mapping an entity.
- **Entity Name:** Select the entity you want to map. You can choose from all the entities that are present in the CRM by default or the custom entities created by you.
- **Link To:** Check the link to option to link the selected entity to some other entity. After checking the box, you will get a list of relationships with which you can link the selected entity.

Entity to Map

General

Entity Name\*

Account

Link To

☐

Total Records

49

Geocoded Records

49

Address Fields

Street 1\*

Address 1: Street 1

State/Province\*

Address 1: State/Province

Street 2\*

Address 1: Street 2

Postal Code\*

Address 1: ZIP/Postal Code

City\*

Address 1: City

Country\*

Address 1: Country/Region

Latitude\*

Address 1: Latitude

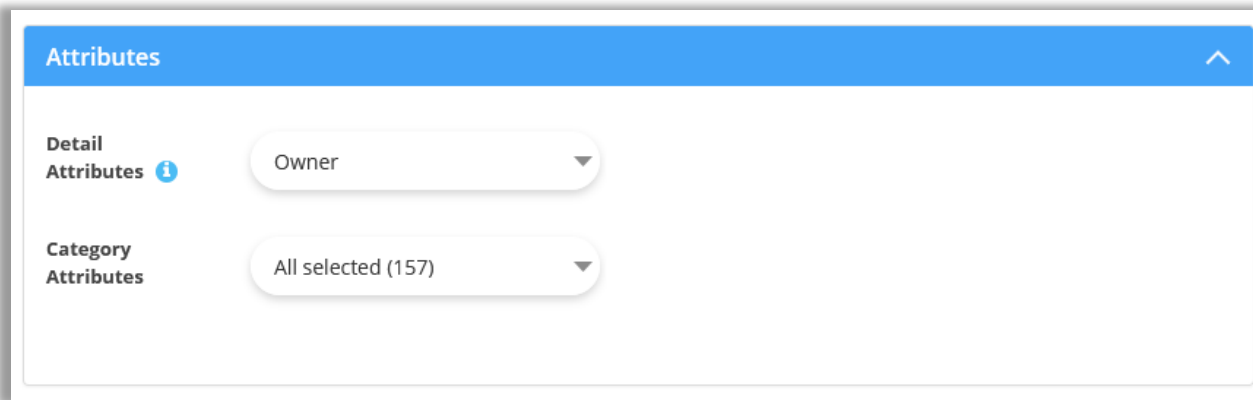
Longitude\*

Address 1: Longitude

Automatically Geocode New Records ☒

- Activity Entities work only on **Account**, **Contact** or **Lead** addresses marked as regarding address.
- **Total Records:** It displays how many records the entity contains.
- **Geocoded Records:** It displays how many records are geocoded.
- **Address Fields:** Select the address fields for the entity, to be used for geocoding. By default, it will consider map’s certain address fields. If needed they can be changed.
- **Automatically Geocode New Records:** If it is checked, it geocodes the record automatically as per saving configuration.
- Once you have filled all details, click on “**Save**” button. Entity will be mapped, and success/failure message will be displayed.

## Attributes



**Attributes**

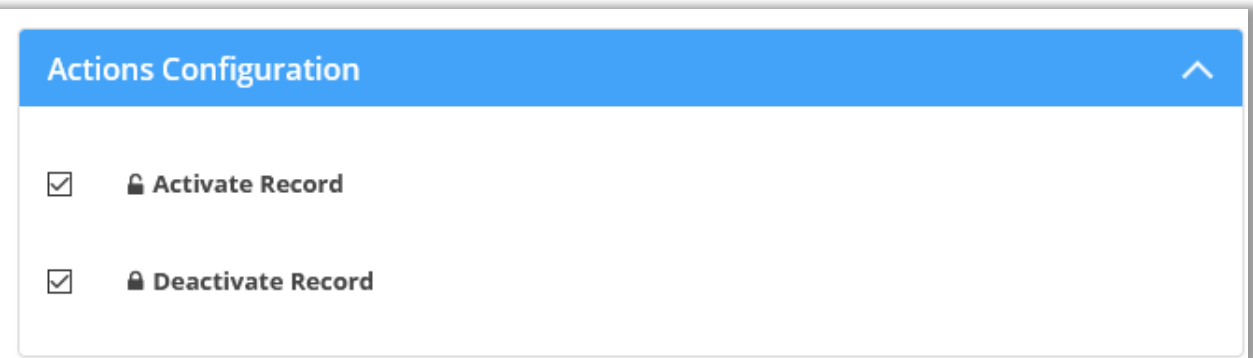
**Detail Attributes** ⓘ Owner

**Category Attributes** All selected (157)

- For mapped entities, further configurations can be managed like **Attributes**. It includes **Detail Attributes** and **Category Attributes**.
- 'Detail attributes' are the ones that appear on card upon clicking on 'pushpin pointer' 📌. At max 10 attributes can be selected.
- 'Category attributes' are the ones that appear in dropdown for 'category' selection. You can select as many attributes as you want for category selection.

## Action Configuration

- For mapped entities, you can edit action configuration section where you can check/uncheck the action buttons according to your requirement.
- This will reflect on the tooltip card. Here, only those action buttons will be shown that can be changed. Default buttons will not be shown in this configuration section.



**Actions Configuration**

☒ 🔒 **Activate Record**

☒ 🔒 **Deactivate Record**

## Data Grid Attributes

- From here, you can select the attributes for the **data grid**. When you plot any data in map *or* in heat map, grid data will be displayed according to attributes selected here.
- If 'Display Full Address' checkbox is checked in data grid, it will display records with full address.
- You can select maximum 8 data grid attributes.

Data Grid Attributes

☒ Display full address

Attribute*	Attribute	Display Name	Action
	Account Name	Account Name	
Display Name*	Owner	Owner	✕

Add

## Summary Card Configuration

- You can make configurations related to what you want to display on summary card.
- For summary card of an entity, you can choose the attributes that you want from the dropdown list.
- Also, under aggregate method, you can define the way you want records to be summarized. It can be either sum or average. Also, you may define display name of that attribute.
- By default, it is same as attribute name. All the selected attributes are shown in the list from where it can be removed as well.

Summary Card

Attribute\*

Aggregate Method

Display Name\*

Attribute	Display Name	Aggregate Method	Action
Number of Employees	Number of Employees	Sum	✕
Annual Revenue	Annual Revenue	Sum	✕

Add



## Views Configuration

- You can select the view that you want to display on the map for particular entity.

**Views Configuration**

<input type="checkbox"/> Views	View Type
<input checked="" type="checkbox"/> My Active Accounts	System View
<input checked="" type="checkbox"/> Active Accounts	System View
<input checked="" type="checkbox"/> Inactive Accounts	System View
<input checked="" type="checkbox"/> Selected Accounts Campaigns	System View
<input checked="" type="checkbox"/> Accounts I Follow	System View
<input checked="" type="checkbox"/> Accounts Being Followed	System View
<input checked="" type="checkbox"/> Accounts: Responded to Campaigns in Last 6 Months	System View
<input checked="" type="checkbox"/> All Accounts	System View
<input checked="" type="checkbox"/> My Connections	System View
<input checked="" type="checkbox"/> Accounts: No Orders in Last 6 Months	System View
<input type="checkbox"/> All Accounts (not available)	System View
<input checked="" type="checkbox"/> Accounts: Influenced Deals That We Won	System View

## Relationship Configuration

- The selected relationship id from the Relation List and the name gets plotted as part of related records associated with a record.
- In 'Relationship Configuration', Default Relationship 'radio button' is given to display the Default relationship at the time of loading the record map.

Relationship Configuration				
<input type="checkbox"/>	Relationship List	Relation Schema	Relationship Id	Default Relationship ?
<input type="checkbox"/>	account - principalobjectattributeaccess	account_principalobjectattributeaccess	objectid	<input type="radio"/>
<input type="checkbox"/>	account - fax	Account_Faxes	regardingobjectid	<input type="radio"/>
<input type="checkbox"/>	account - slakpiinstance	slakpiinstance_account	regarding	<input type="radio"/>
<input type="checkbox"/>	account - postfollow	account_PostFollows	regardingobjectid	<input type="radio"/>
<input type="checkbox"/>	account - postregarding	account_PostRegardings	regardingobjectid	<input type="radio"/>
<input type="checkbox"/>	account - postrole	account_PostRoles	regardingobjectid	<input type="radio"/>

Showing 1 to 72 of 72 entries

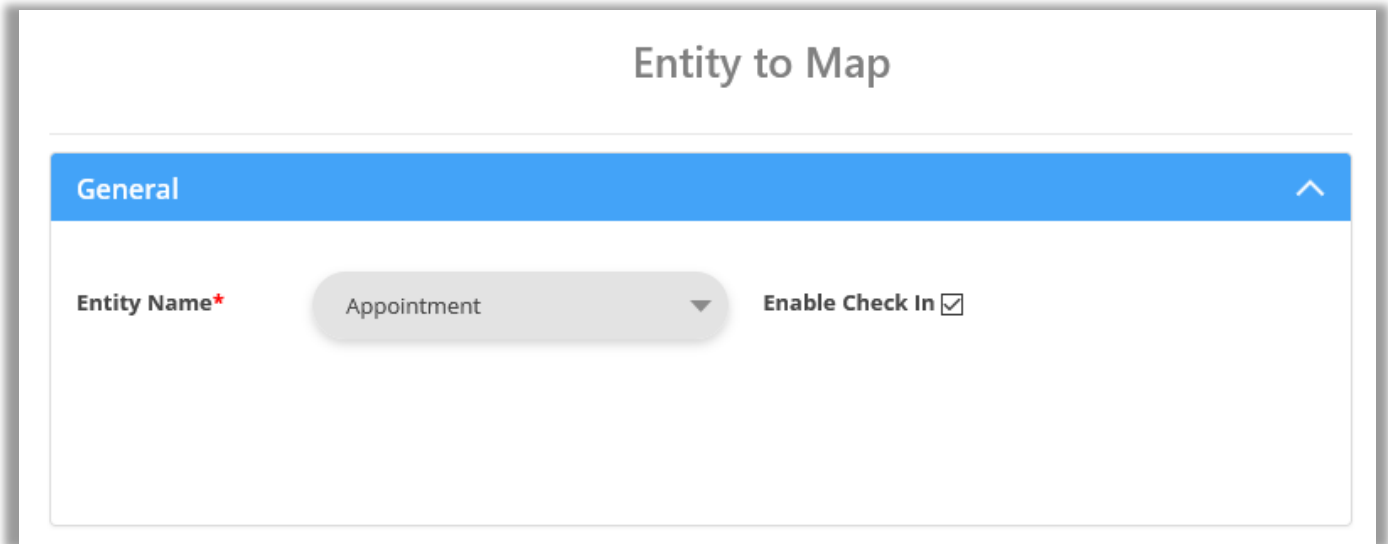
## Tooltip Attributes Configuration

Tooltip Attributes				
Attribute*	<input type="text" value="--"/>	Attribute	Display Name	Action
		Account Name	Account Name	
Display Name*	<input type="text" value=""/>	Owner	Owner	✕
<input type="button" value="Add"/>				

- You can make configurations related to what you want to display on 'tool tip' when anyone hovers on that record.
- For that, you can choose the attributes that you want from the dropdown list. You may also define display name of that attribute. By default, it is same as attribute name. All the selected attributes are shown in the list from where it can be removed as well.
- After making all the configurations, click on Update button to complete the process.

## Enable Check-In

- You will get Check-In & Check Out options for all activity entities along with **Add Notes** and **Attachment** options.
- To enable the **Check In** option for the activities like etc., tick the **Enable Check In** option.



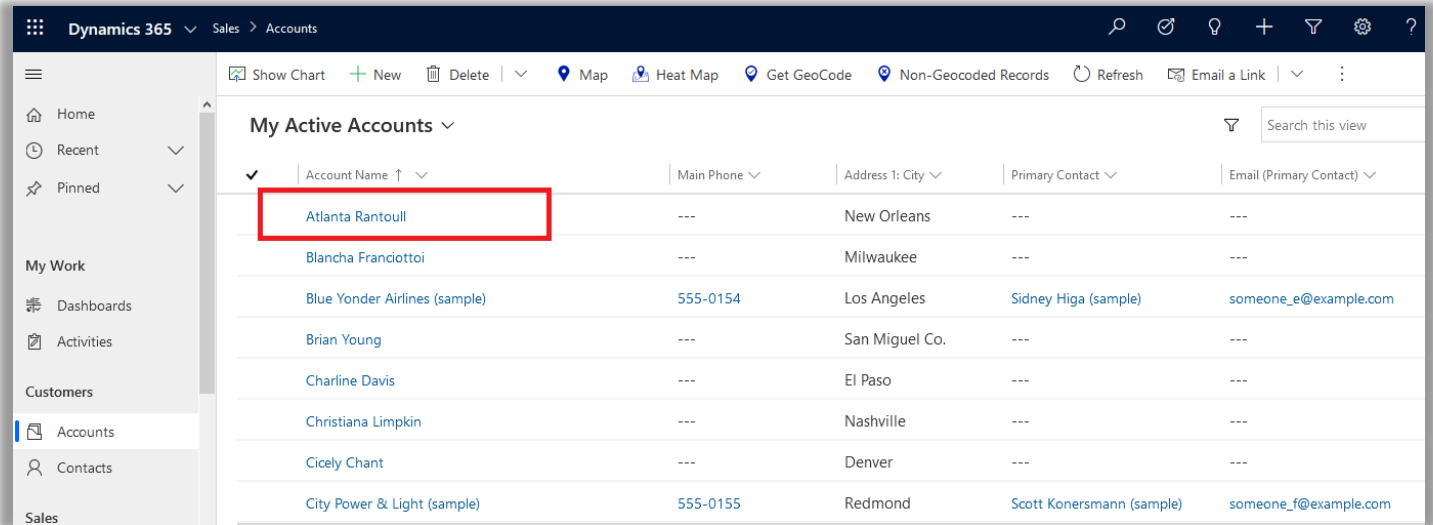
The screenshot shows a web form titled "Entity to Map". It has a blue header bar with the word "General" and an upward-pointing arrow. Below the header, there is a form area with a label "Entity Name\*" in red. To the right of the label is a dropdown menu showing "Appointment" with a downward arrow. Further right is a checkbox labeled "Enable Check In" which is checked.

- By checking it, you will get the **Check-In & Check-Out** features for your activity.

# Geocode Records

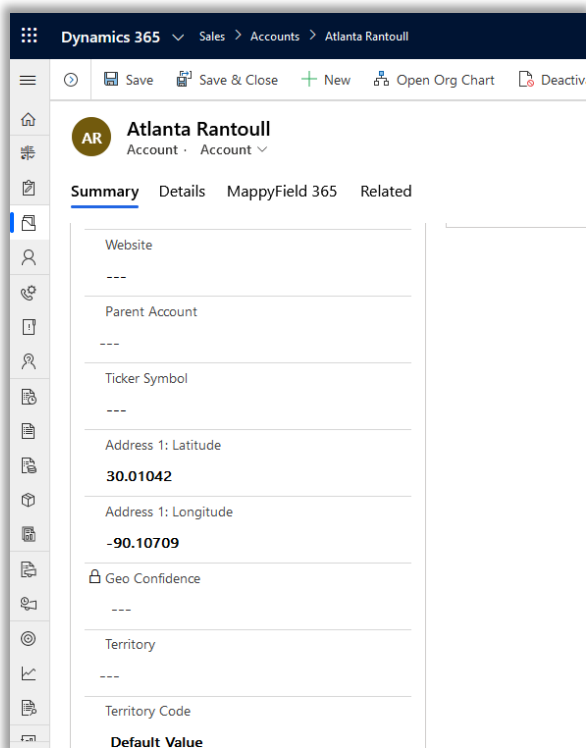
## Manually Geocode the Record

- Navigate to the record for which you want to manually set a geocode: Latitude & Longitude.



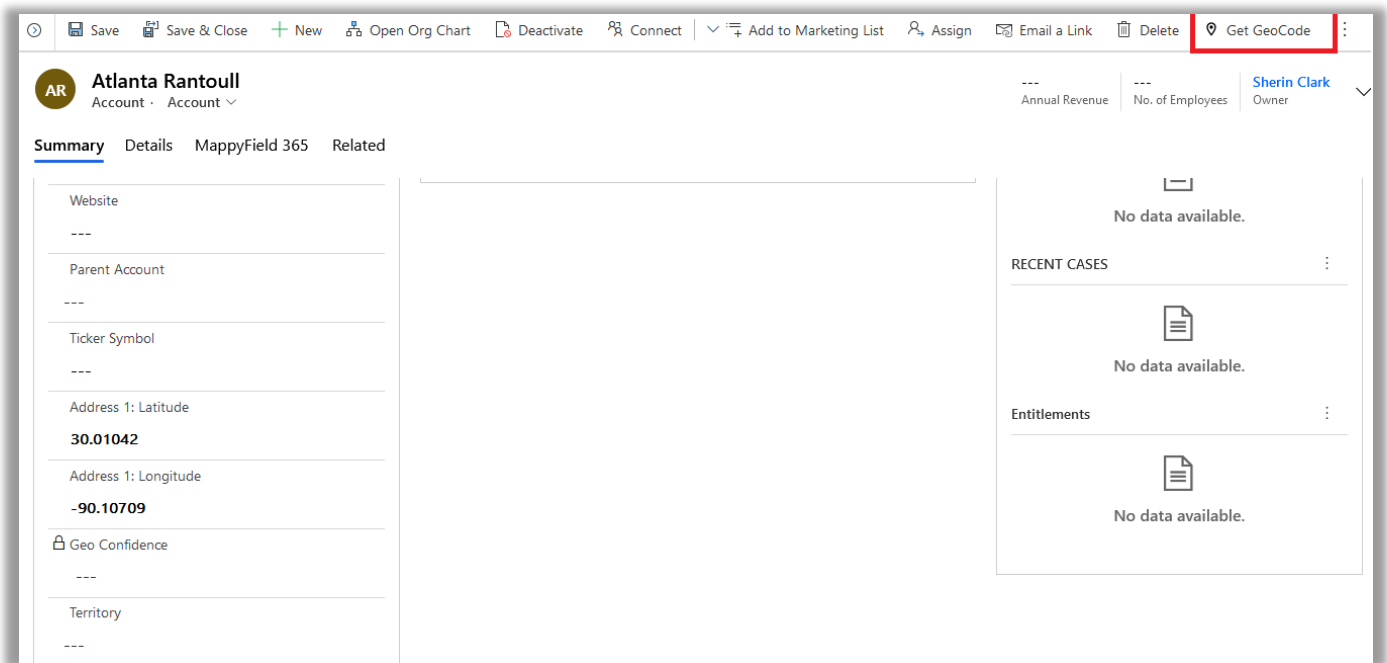
- You will get the Geocode as per your selection of view. Here you get the Geocode for “My Active Accounts”. If you have not selected any record, it will get Geocode for all the Records.

**Ex.** If you want to geocode any record of account, go to **Sales -> Accounts** and select a record.



- After selecting a record and clicking on **Get Geocode**, the “Latitude” & “Longitude” will get updated as per the address details.
- If you check, the account details, the Geocode: Latitude & Longitude is updated as shown in the screenshot.

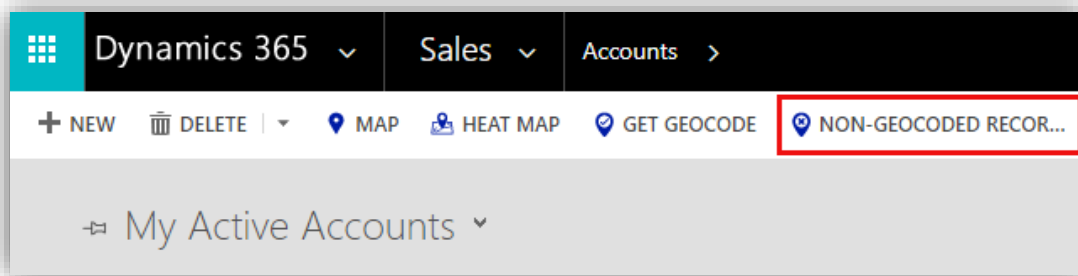
**Note:** You get option to geocode records only when that particular entity is **mapped** from Entity Mappings configuration.




- If you changed the address, then you need to manually geocode that record by clicking on the “Get Geocode” button from the menu.

## Non-Geocoded Records

- Navigate to the entity for which you want to get a non-geocode detail.
- For example, if you want to check the Non-Geo Coded records from the multiple records of an account entity, go to **Sales -> Account**.



- Click on **Non-Geocoded Record** button, it would show listing of all the non-geocoded records along with their address.
- You can also view details of the record by clicking on view icon  under action column.

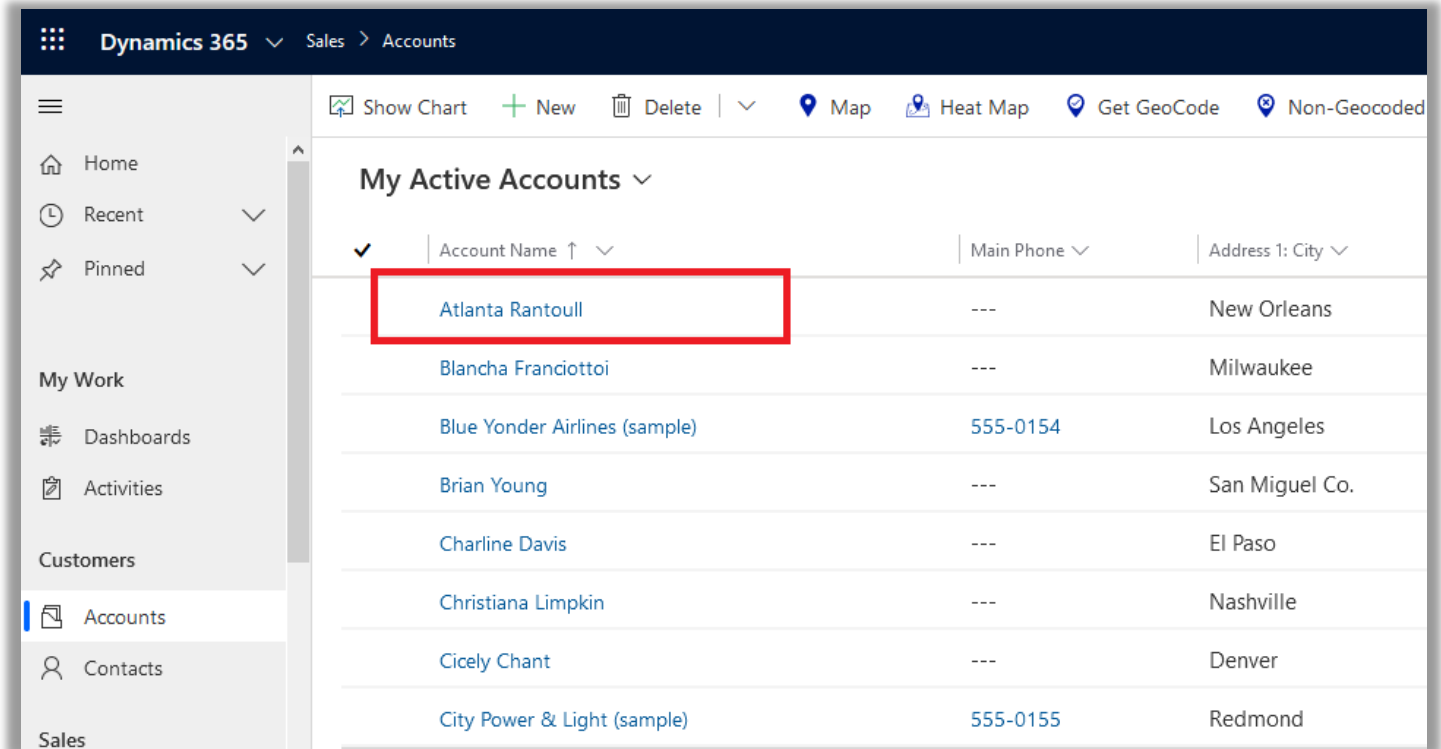
Non-Geocoded Records		
<div><div>Copy</div><div>Excel</div><div>PDF</div><div>Print</div></div> <div>Search: <input type="text"/></div>		
Full Name	Address	Action
Avie Norgate	82067 Independence Junction Pas Pul	
Boot Moralas	90434 Washington Terrace Ordos	
Dorie Beckles	04 Schurz Parkway Hengfan	
Eleanora Jervoise	540 Carey Lane Putun	
Flem Humpherson	0657 Longview Place Krajan Kedungsalam	
Gawain Moorman	571 Myrtle Avenue Olejet	
Nannie Fargher	2694 Pond Center Son Trà	
Pall Curl	405 Dwight Street Bojonggaling	

- For the list generated, you can also perform actions like **Copy**, **Excel**, **Pdf**, **Print** and **Search** as well.

## Individual Records on Map View

### MappyField 365 section in Record Details

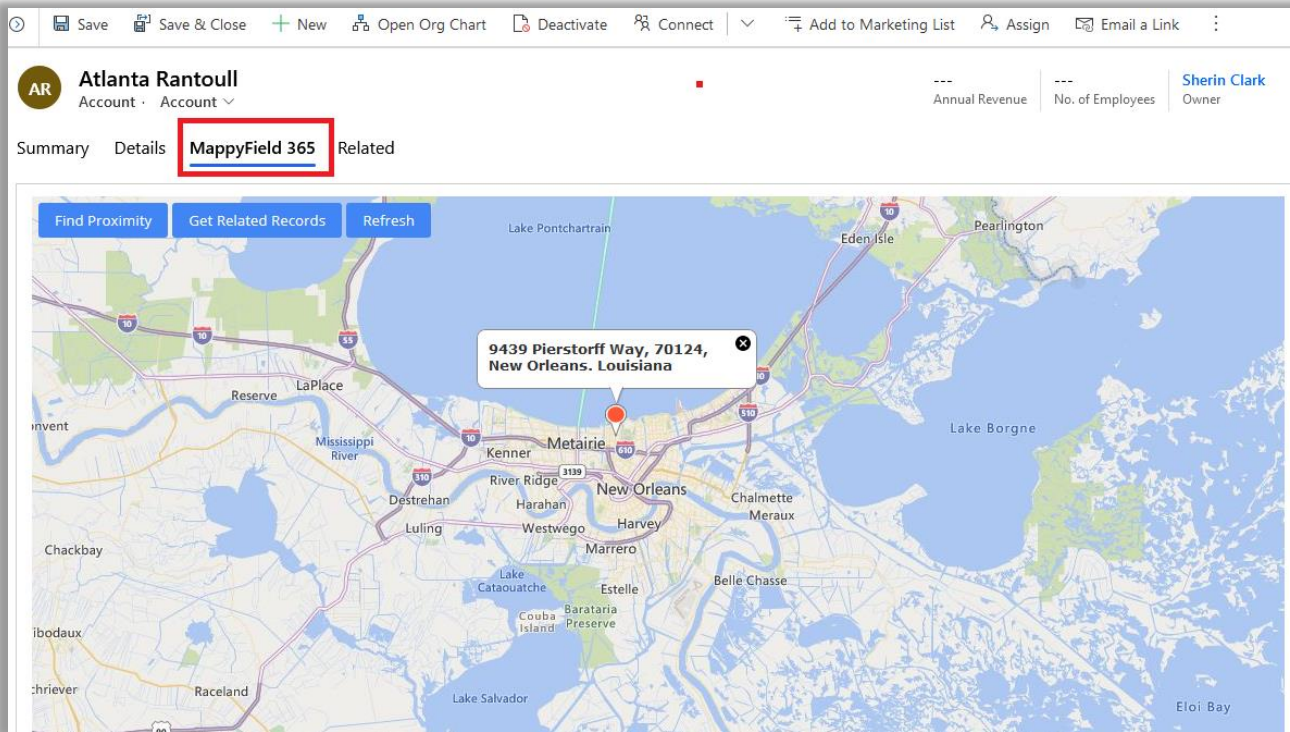
- MappyField 365 is separately provided in the **Details** page of any record of all the mapped entities.
- Click on any record of account entity.




The screenshot displays the Dynamics 365 interface for the 'Accounts' entity. The left-hand navigation pane includes sections for 'My Work' (Dashboards, Activities) and 'Customers' (Accounts, Contacts). The main content area is titled 'My Active Accounts' and features a table of account records. The table has columns for 'Account Name', 'Main Phone', and 'Address 1: City'. The first record, 'Atlanta Rantoull', is highlighted with a red rectangular box. Other records include 'Blancha Franciottoi', 'Blue Yonder Airlines (sample)', 'Brian Young', 'Charline Davis', 'Christiana Limpkin', 'Cicely Chant', and 'City Power & Light (sample)'.

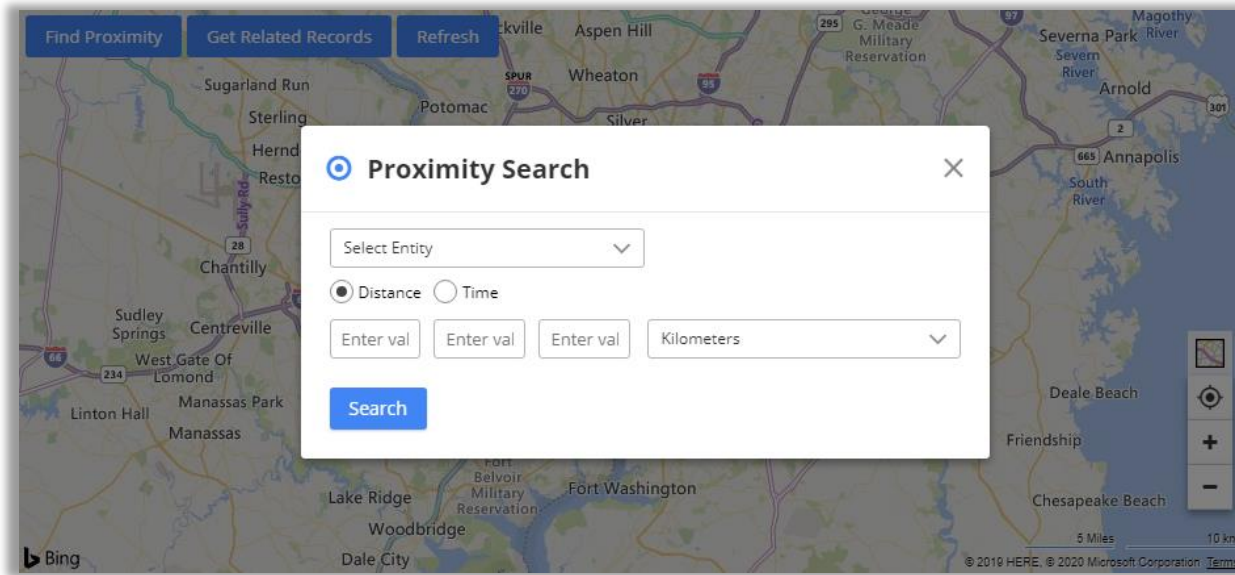
Account Name	Main Phone	Address 1: City
Atlanta Rantoull	---	New Orleans
Blancha Franciottoi	---	Milwaukee
Blue Yonder Airlines (sample)	555-0154	Los Angeles
Brian Young	---	San Miguel Co.
Charline Davis	---	El Paso
Christiana Limpkin	---	Nashville
Cicely Chant	---	Denver
City Power & Light (sample)	555-0155	Redmond

- By clicking on the account name, you will get the summary and the details of that account and by scrolling down, you will get the separate 'MappyField 365' section.



- On map there is a pin  plotted based on the address entered for the record.
- To update the latitude and longitude of the record, you need to move the pin to the desired location. On moving, it would prompt a confirmation message. Click **OK** to update and continue.
- You can update latitude and longitude using record map for records of Account, Contact and Lead Entities.
- Along with that there are three action buttons: **Proximity**, **Get Related Records** and **Refresh**.
- Find Proximity**: Clicking on it, you can perform proximity search from that pin and find records nearby. It would show records based on entity selected from the dropdown.

















- **Get Related Records:** This action button would fetch all related records to the plotted pin based on relationship set from the configurations section.
- **Refresh:** This button would just refresh the map to default map type removing any action performed on map.

## View Map from Entity Menu

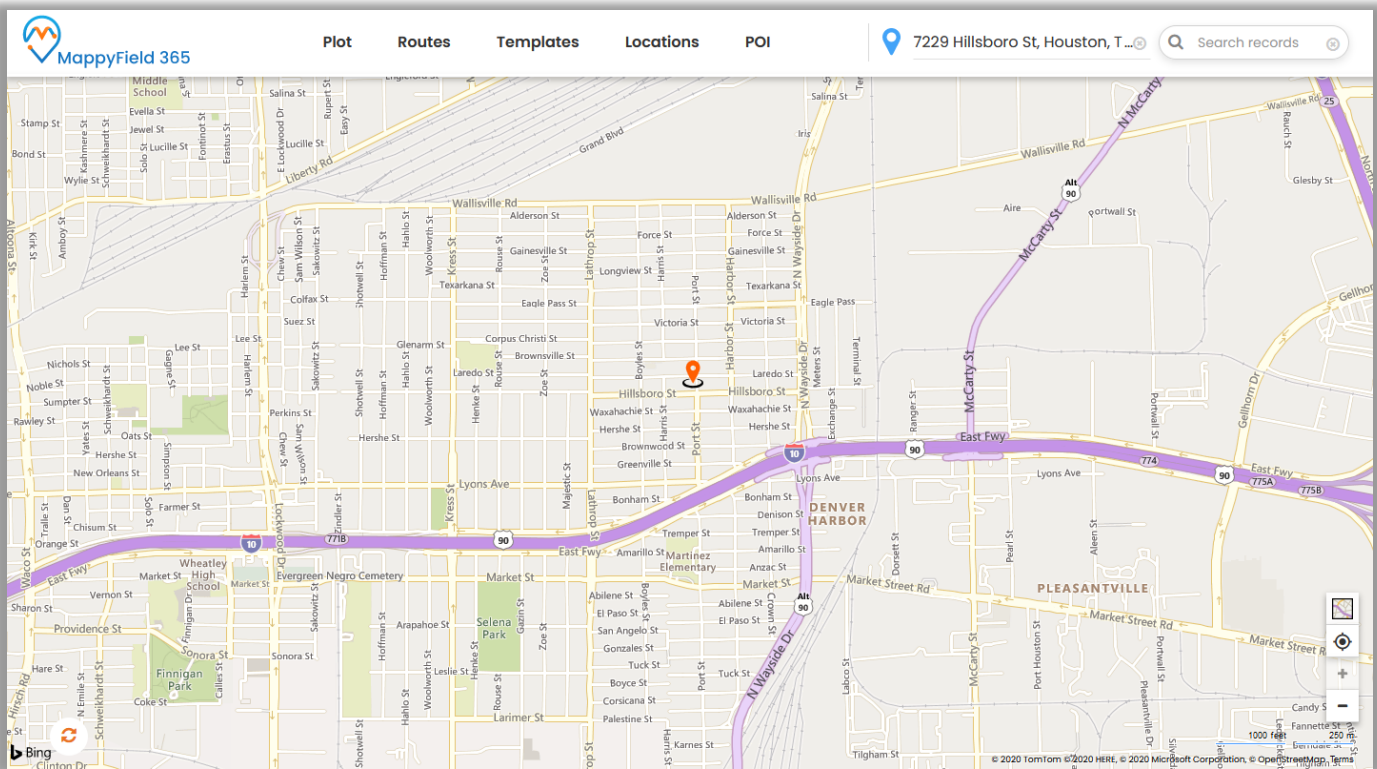
- The map options are provided in all the entities on the header.
- You can access the  **Map** and  **Heat Map** from the Entity.

 Show Chart
  New
  Delete
  Map
  Heat Map
  Get GeoCode
  Non-Geocoded R

### My Active Accounts

	Account Name  	Main Phone 	Address 1: City 
	Atlanta Rantoull	---	New Orleans
	Blancha Franciottoi	---	Milwaukee
	Blue Yonder Airlines (sample)	555-0154	Los Angeles
	Brian Young	---	San Miguel Co.
	Charline Davis	---	El Paso
	Christiana Limpkin	---	Nashville
	Cicely Chant	---	Denver

- By clicking on 'Map' or 'Heat Map', you will be redirected to the details of the Maps for that particular entity.



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- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/dynamics365-mappyfield-365.htm> and click on the Live Chat button for instant support.



### Tickets

- Raise tickets for your specific question!
- Send an email to [support@appjetty.com](mailto:support@appjetty.com) or you can login to your account @ [www.appjetty.com](http://www.appjetty.com) and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

### Customization:

If you would like to customize or discuss about additional features for **Dynamics CRM MappyField 365**, please write to [sales@appjetty.com](mailto:sales@appjetty.com)